

Using Case Notes

To Enter a Case Note:

- You should enter thorough case notes when appropriate (refer to policy guidelines).
- Workers may enter case notes for other workers in their county.

Step	Action
1.	Press F10 from a TEAMS screen to access CANO (Case Notes). <ul style="list-style-type: none"> • The Case Name and Number for the current case will be displayed, but you may type a different case number if desired, and press Enter.
2.	Enter a title for the case note in the DESC (Description) field. <ul style="list-style-type: none"> • The description should provide the “gist” of the case note. If desired, also enter the Program/Subtype code and benefit month for which the note applies.
3.	Tab to the blank lines, and begin typing the text of the note. <ul style="list-style-type: none"> • If your note is intended to be one paragraph, it’s not necessary to monitor lines breaks, or add spaces at the end of the lines. Simply type the note text in its entirety. • If you need to include a blank line (in order to visually separate sections of information and create separate paragraphs within a note), type your first paragraph, then press F6. Use your arrow keys to move down to the appropriate line (leaving one line blank). Type your second paragraph and press F6 again. Repeat this step for any additional paragraphs.
4.	Press F6 to allow TEAMS to insert appropriate line breaks, if you have not already done so.
5.	Press Enter to save the note when you are finished (or when there is not much space left on the screen). Pressing F10 will also save the note you are adding and display a blank screen, so another note can be added.
6.	Then press F9 to exit CANO and return to the previous screen, or press F10 to create another note. <ul style="list-style-type: none"> • If Enter was not pressed, F9 will exit the screen without saving the note.
7.	Press F10 again if necessary to add another page of notes; repeat Steps 2 – 5 above.

Other tips for entering Case Notes:

- You can insert characters between other characters by pressing the Insert key (near the Home key). However, this can be tricky when using the new F6 word wrap function. If you use F6 to word wrap the text, and then insert characters and use F6 to word wrap again, this can cause unexpected results. If you see that you need to add words, it might be easier to copy and paste into a new note. This way, you can insert the new word(s) prior to using the F6 word wrap.
- You can delete characters by using the Delete key (not the Backspace key). When you press Enter, the text will “rejoin” to close up the space where characters were deleted.
- Do NOT use the End key to delete text in the body of your note. It will erase all the text from that point forward. (If you accidentally use the End key, don’t press Enter. Instead, press F9 to exit the screen without saving the erasure.)

To Read a Case Note or Amendment:

Step	Action
1.	<p>Enter the case number on SYSE (or another menu), and 'Next' to the CANS (Case Note Summary) screen.</p> <ul style="list-style-type: none"> The titles of all case notes (and Component notes, if any) are shown, with the most recent listed first. Amendments are indented, directly below the original note, regardless of the date the amendment was entered. Also displayed are the entry date, the program and subtype (if entered on CANO), and the worker who entered the note. Notes that display an asterisk (*) at the far left are <i>component notes</i> which are associated with a TANF Cash Employability Plan/Family Investment Agreement and entered on the CONO screen.
2.	<p>Select a note, and type the letter I (Inquire) in the I/C/D field next to that note. Press Enter. The CANO screen will display, showing the full text of that note.</p> <ul style="list-style-type: none"> To read the next note (if any), press F8 while viewing the CANO screen. (You don't need to return to CANS to select another note.) To read the prior note (if any), press F7 while viewing CANO.
3.	Press F9 to exit the CANO screen and return to CANS.

To Change or Delete a Case Note or Amendment:

Step	Action
1.	Follow Step 1 above to access CANS , the same day the note was created.
2.	<p>Type a letter in the I/C/D field next to the desired note, as follows:</p> <ul style="list-style-type: none"> To change a note, type C (Change) and press Enter. <ul style="list-style-type: none"> Only the worker who entered a note may change it (except <i>component</i> and <i>system-generated</i> notes, which cannot be changed). To delete a note, type D (Delete) and press Enter. <ul style="list-style-type: none"> Only the worker who entered a note may delete it (except <i>component</i> and <i>system-generated</i> notes, which cannot be deleted). Users with inquiry-only access may not change or delete case notes. The original note can only be deleted if all associated amendments are deleted.

3.	<p>On CANO, follow instructions shown at the bottom of the screen:</p> <ul style="list-style-type: none"> • If Changing a note, type new text as needed and press Enter to save (or F6 to use the word wrap function, then press Enter). Then press F9 to return to CANS, or press F10 to create another note. • If Deleting a note, press Enter to delete the displayed note. When prompted to confirm the deletion, press Enter again. Then press F9 to return to CANS. <ul style="list-style-type: none"> – If you don't want to delete the note, press F9 without pressing Enter.
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To Amend a Case Note (including system-generated ones) or a Component Note:

Step	Action
1.	Follow Step 1 in the “To Read a Case Note” section to access CANS .
2.	Type an I in the I/C/D field next to the desired note.
3.	Type a Y in the AMEND CASE NOTE field and press Enter. <ul style="list-style-type: none"> – The description will automatically default to the description of the note you are amending.
4.	Type your amendment note text and press F6 to use the word wrap function. Then press Enter to store your amendment. Press F9 to return to CANS , or press F10 to create another note.